

Plaintiffs' Exhibit 109

Message

From: Brad Bender [bradbender@google.com]
Sent: 6/25/2014 5:05:33 AM
To: Bhavesh Mehta [bhavesh@google.com]
CC: Bahman Rabii [bahman@google.com]; Johan Land [johanland@google.com]; Woojin Kim [woojink@google.com]
Subject: Re: GDN inventory deck

Let's have the meeting at 9am tomorrow. There seems to be alignment around the issue which is good - so the discussion should focus on the recommended tactics and plan for the meeting. I do think it is important to clarify where we are being fully disintermediated (for instance where other players' tags are called before DFP) and where our platform is the primary tag but we are being used as backfill.

On Tue, Jun 24, 2014 at 9:27 PM, Bhavesh Mehta <bhavesh@google.com> wrote:

I asked for the deck yesterday after I saw the meeting invite and heard some discussions among you. I wished we had more time to discuss this among ourselves in a smaller group.

I don't believe we need to have complete consensus to present every topic to N/E/S, but looks like at a minimum the pub side PMs should know about it, which apparently they do now but are unhappy with it. I have no idea how much consensus Neal expects ahead of time among all the PMs.

If we are going to go ahead with the meeting, then one of you should inform Neal that we don't have complete consensus on this proposal, but we were asked to come up with some proposal to the disintermediation problem in our review with Eisar so we came up with this one. It may not be the best one but we'd like others to come up with a better one. If this brings urgency in the organization to come up with a better solution than that's good IMHO.

Does the pub side have a timeline (more definitive than *few weeks*) from when they will come up with a better proposal for fixing the first look/disintermediation problem?

On Tue, Jun 24, 2014 at 7:48 PM, Bahman Rabii <bahman@google.com> wrote:

How can I help?

On Tue, Jun 24, 2014 at 6:32 PM, Johan Land <johanland@google.com> wrote:

-non GDN

+Bahman/Bhavesh

We'll pretty much never get everyone fully pre-aligned. I feel personally that I (as part of GDN) has an obligation to raise this topic as a serious buy-side concern. **Half of our impressions have been seen by other networks** before we get to bid on them, and this **despite us sending AdX/DFP/AdSense a \$3bn yearly check** by overcharging our advertisers to ensure we're strong on the pub side. If nothing else, I want to (politely and collaboratively) make it heard that **GDN is not happy with the job the pub side is doing** and we are asking for them to take REALLY tangible measures to get us out of the current disintermediation situation.

We have a meeting with Rohit tomorrow morning 9am. I think I need some help on aligning all these folks... :)

/Johan

On Tue, Jun 24, 2014 at 6:22 PM, Jonathan Bellack <jbellack@google.com> wrote:

Mild +1 to delay or at least reducing scope to AdSense tags only. I just saw the deck today, and it has good stuff but the AdX tag / DFP prioritization stuff isn't baked, or even necessarily agreed within the DoubleClick PM+eng team.

Really seems like three to six related but not identical issues here:

1. AdSense mediated already, how to measure/reduce/resolve
2. AdX "second-look" deals in markets where DFP is weaker, are they good long-run and what should sales strategy be?
3. GDN getting first-look in DFP comparable to Criteo -- Max Loubser's ideas etc.
4. GDN behavior when 2nd bids are sparse -- seems relevant but unattached?
5. Other cases in DFP where other manual trafficked indirect sales deals are coming before AdX auction kicks in --
 - 5a. Growing programmatic overall I.e. Drew's indirect sales plan
 - 5b. Any other GDN-specific strategies as the largest buyer on AdX

On Jun 24, 2014 9:06 PM, "Aparna Pappu" <apappu@google.com> wrote:

Hi Rohit,

Scott and I spoke to Johan as well - the biggest issue area of difference for us is the carrot vs stick approach. We believe the stick will be harmful and need to first try the carrot.

Perhaps we can use tomorrow's time to bring awareness to N/S/E and say there are options on strategy.

Are you on board with the carrot approach? Obviously this depends on AdSense having a yield manager which I think is also a proposal that was approved AFAIK.

Thoughts?

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On Tue, Jun 24, 2014 at 8:35 PM, Rohit Dhawan <rohit@google.com> wrote:

Hey Johan,

I'm glad we spoke earlier today. I wanted to bring Jonathan/Woojin/Scott also into the conversation so we can collectively decide on the best way to present to Neal/Scott/Eisar.

My perspective is that we need to:

- make N/S/E very aware of the inventory challenges we face around first look across DFP and AdSense..
- present a joint strategy to address the challenges

Given Drew/Nick/you/I haven't chatted much over the last few weeks and seeing the comments on the Asks slide, I'm concerned we will come across as not collaborating with each other... which is the case over the last two weeks, but is certainly not the case in general.

2 weeks ago, we presented the AdSense inventory challenges to N/S/E in detail and said we will come back with a joint plan with GDN/DPP/AdSense to address the AdSense issue which is largely why I scheduled our meeting today. I know the DPP team has had multiple conversations with Neal/Scott on EDA. Your preso for tomorrow as it currently stands does a good job of making N/S/E aware of the first look problem (again?), but IMHO puts meaningful doubt in their minds of whether we are collaborating which isn't good for any of us.

If everyone feels that N/S/E are more than aware of the inventory challenges, I propose we delay the meeting for a couple of weeks until we have collectively spent enough time with a vetted list of options coupled with our recommended approach.

thoughts?

Johan Land	Product Manager	johanland@google.com	650-380-8936
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Brad Bender	Director, Product Management	bradbender@google.com	212.381.5430
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